

WV Online Case Management (CM) Pilot Project

Job Aid: My Work Lists

Revised Apr. 1

My Participants (for CMs and RNs)

- Agencies:
 - View list of Participants assigned to Worker and search/select
- Ticklers:
 - View list of Ticklers assigned to Worker and search/select, including past due and within date range of Alert Days (e.g., 60 days before Assessment due)
 - Dummy 'Tickler to enable display (do not cancel)' to enable Ticklers pane
 - After clicking on hyperlink to display Ticklers, may uncheck box "Apply Alert Days Before Due" to view Ticklers due in future
 - Filters include: Tickler (Begins With or Contains), Date (Less Than), Status
 - Fly-out menu includes: Cancel, Reassign, Complete, View Participant's Record
- Alert Notes:
 - View Notes received with Status = 'Alert' and Read Status = 'Unread'
 - Filters include Read Status (including value 'Read')
 - Click on hyperlink to view Note page OR View Record link to view all Pages

Note: Send Alert Note using Status = 'Alert' and Note Recipient; 'Mark as Read' in Tools menu

See Core Workflow Guide, section B.3 (Update as Needed - Minor Change), steps 5 and 6.

- Notes:
 - View Notes received with Status = 'Pending' or 'Complete' and Read Status = 'Unread'

Supervisors

- Ticklers:
 - View Ticklers assigned to Workers of Primary Supervisor and grouped by Worker, including past due and within date range of Alert Days
 - After clicking on hyperlink to display Ticklers, may uncheck box "Apply Alert Days Before Due" to view Ticklers due in future
- Alert Notes:
 - View Notes received OR sent with Status = 'Alert' and Read Status = 'Unread'
- Clinical Documents:
 - Correct if forgot to update as 'Complete'
 - if Status = 'Complete' for Service Plan – Supplement, reverse status in File menu to unlock and update as 'Active'
- Service Plans:
 - Correct if forgot to update as 'Active' or 'Complete' (after Plan period ended)

Note: Supervisors view list in Agencies chapter > Participants page and click on View hyperlink to select record; or use Quick or Advanced Search in Participants chapter. Supervisors can view Participants who are active (pilot) or inactive (not selected for pilot) in Advanced Search.